Customer Onboarding & Workflow Automation Platform

Development Phase Plan

This document outlines a phased development plan to build the Customer Onboarding & Workflow Automation Platform in a structured, trackable, and enterprise-aligned manner.

Phase 0: Planning & Foundation

- Finalize architecture diagram and system scope
- Confirm user stories, roles, and status flow
- Define database schema and API contracts
- Create GitHub repository

Exit Criteria: Ability to explain the full system end-to-end.

Phase 1: Backend Core (Spring Boot + Oracle)

- Set up Spring Boot project structure
- Create entities and repositories
- Implement onboarding submission and retrieval APIs
- Add validations and duplicate checks

Exit Criteria: Customer onboarding works via REST APIs.

Phase 2: Approval & Business Logic

- Implement role-based approval logic
- Enforce status transitions
- Persist approval audit history
- Handle error and edge cases

Exit Criteria: Full approval flow works via backend APIs.

Phase 3: Appian Workflow Integration

- Build onboarding form in Appian
- Configure REST connected systems

- Create approval process models
- Set up role-based task routing

Exit Criteria: End-to-end onboarding works through Appian UI.

Phase 4: Audit, Visibility & Polish

- Expose approval history in UI
- Add logging and exception handling
- Generate Swagger API documentation
- Improve status dashboards

Exit Criteria: System is stable and demo-ready.

Phase 5: Testing, Documentation & Demo

- Write unit tests for service layer
- Create Postman collections
- Finalize GitHub README and diagrams
- Prepare demo walkthrough

Exit Criteria: Project is complete and interview-ready.